



## United States Department of State

*Bureau of Human Resources  
Office of Retirement  
Room H-620, SA-1  
Washington, D.C. 20522*

### **BUREAU CHECKLIST for RETIREMENT PACKAGES**

#### **CIVIL SERVICE RETIREMENT SYSTEM (CSRS)**

- |                          |           |   |
|--------------------------|-----------|---|
| <input type="checkbox"/> | SF-2801   | Application for Immediate Retirement – CSRS                                   |
| <input type="checkbox"/> | SF-2801   | Schedules A, B, C   |
| <input type="checkbox"/> | SF-2801-1 | Certified Summary of Federal Service  |
| <input type="checkbox"/> | SF-2801-2 | Spouse's Consent to Survivor Annuity  |
| <input type="checkbox"/> | SF-2801-3 | Election of Former Spouse Survivor Annuity                                    |
|                          |           | Combination Current/Former Spouse Annuity                                     |
| <input type="checkbox"/> | SF-2801-D | Agency Checklist of Immediate Retirement Procedures                           |
| <input type="checkbox"/> | SF-2808   | CSRS Designation of Beneficiary Form  |
| <input type="checkbox"/> | SF-2810   | Notice of Change in FEHB Enrollment (RET)                                     |
| <input type="checkbox"/> | SF-2818   | FEGLI Continuation of Life Insurance Coverage As an Annuitant or Compensation |
| <input type="checkbox"/> | SF-2819   | FEGLI Notice of Conversion Privilege  |
| <input type="checkbox"/> | SF-2821   | FEGLI Agency Certification of Insurance Status                                |
| <input type="checkbox"/> | SF-2823   | FEGLI Designation of Beneficiary  |
| <input type="checkbox"/> | SF-52     | Request for Personnel Action by Bureau  |
| <input type="checkbox"/> | SF-1199A  | Direct Deposit Bank Sign-Up Form  |
| <input type="checkbox"/> | DD-214    | Military Service Documentation (From OPF or Employee)                         |
| <input type="checkbox"/> | W-4P      | Withholding Certificate for Pension or Annuity Payments                       |
| <input type="checkbox"/> | Other     |   |

#### **FEDERAL EMPLOYEES RETIREMENT SYSTEM (FERS)**

- |                          |           |   |
|--------------------------|-----------|---|
| <input type="checkbox"/> | SF-3102   | FERS Designation of Beneficiary   |
| <input type="checkbox"/> | SF-3106-A | Current/Former Spouse Notification of Application for Refund                  |
| <input type="checkbox"/> | SF-3107   | Application for Immediate Retirement – FERS                                   |
| <input type="checkbox"/> | SF-3107   | Schedules A, B, C   |
| <input type="checkbox"/> | SF-3107-1 | Certified Summary of Federal Service - FERS                                   |
| <input type="checkbox"/> | SF-3107-2 | Spouse's Consent to Survivor Election   |
| <input type="checkbox"/> | SF-3107-D | Agency Checklist of Immediate Retirement Procedures – FERS                    |
| <input type="checkbox"/> | DD-214    | Military Service Documentation (From OPF or Employee)                         |
| <input type="checkbox"/> | SF-52     | Request for Personnel Action by Bureau  |
| <input type="checkbox"/> | SF-1199-A | Direct Deposit Bank Sign-Up Form  |
| <input type="checkbox"/> | SF-2818   | FEGLI Continuation of Life Insurance Coverage As an Annuitant or Compensation |
| <input type="checkbox"/> | SF-2819   | FEGLI Notice of Conversion Privilege  |
| <input type="checkbox"/> | SF-2821   | FEGLI Agency Certification of Insurance Status                                |
| <input type="checkbox"/> | SF-2823   | FEGLI Designation of Beneficiary  |
| <input type="checkbox"/> | W-4P      | Withholding Certificate for Pension or Annuity Payments                       |
| <input type="checkbox"/> | Other     |   |